Exercise Guide for

PA310

Create and Maintain Employee Data

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Exercise 3.1: New Hire

Scenario

The Cultural Resources Library is undergoing a digitization process and will hire a new Digitization Clerk into its organizational unit (20010287). The new employee will begin working today at a salary of $22,995. The new employee will be issued a badge and two keys. The employee's military status is Reserve.

There are four parts to this Exercise:

I Initiate Workflow (WF)
II Act as Division/Agency (D/A) Approver and approve PCR
III Act as Funding Approver and approve PCR
IV Process Approved PCR from the Initiator's Inbox

- ☑ It is important that you complete all of the exercises in their entirety because some subsequent exercises depend upon the data that you entered in previous exercises.
- ☑ The New Hire exercise has four parts as outlined above in order to give you an opportunity to see two levels of approval (Agency and Funding). In subsequent exercises, your instructor may have you act as both the Agency Approver and Funding Approver or may have the course navigator perform one or both of those roles.
- ☑ The online Business Process Procedure (BPP) is your step-by-step process. The Exercise Guide is **not** intended to be a step-by-step guide but merely contains the data you will use. There are steps included in the first couple of exercises in the Exercise Guide; after that, you are instructed to use what you have learned up to that point to perform the subsequent exercises.

Part I – Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Log onto SAP using the **Initiator** user id and password.
2. Assume you have already run the Cross Verification Report and did not find the employee in the system; assume you also used PPOSE and verified that the position is vacant.
3. On the Easy Access screen, type **ZPAA076** in the Command field
4. Click . The Employee Action Request screen is displayed.
5. Enter the following data:

Field	Value
Last 4 digits (SSN)	Use any 4 digits of your choosing (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted). **Important! Write down the numbers you used because you will need them again:** ________________________________
Employee Name	Any of your choosing – **Be sure you write down the name you use because you will need this person in subsequent exercises**. ___________________________________
Effective on	Today's date
Action Type	New Hire
Reason	New Hire

6. Click Enter .
7. Click Create . The second screen of the Employee Action Request screen is displayed.
8. Enter the following data:

Field	Value
EE Position	Use the Digitization Clerk position number in the Data Set that was assigned to your student number. Press Enter. Observe that the Employee Group and Employee Subgroup fields are now populated.

Field	Value
EE Group/Subgroup	Change to the appropriate subgroup to indicate that the employee is full time, subject to overtime, and is a **probationary** employee (use the matchcode and then double click the correct selection). SPA Employees FT S-FLSAOT Prob. **NOTE:** When the Position number is entered, the Employee Subgroup defaults to FT N-FLSAOT Perm. Because this is a New Hire, the employee should be in probationary (or trainee) status.
Annual Salary	$22, 995

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions: Work Against and Last Date Worked.

9. Click Enter .
10. Click Save . The Information pop-up is displayed with the assigned PCR number.
11. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
12. Click to close the pop-up.
13. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
14. Select Create > Create Note.
15. Enter a note title.
16. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.
17. Click the green check to close the notes. If applicable, close the notes icon menu.
18. Click Initiate WF. The Information pop-up is displayed indicating that the PCR has been submitted.
19. Click the green check to close the Information pop-up. You are returned to the Employee Action Request (first screen).
20. Click the X in upper right to log off as the Initiator. Click Yes at the Log off popup.
21. On the portal screen, click Log Off link.

22. Click Yes when prompted if you are sure. The Welcome log on screen is displayed.

Part II – Act as D/A Approver and Approve PCR

1. Log onto SAP using the **Approver** user id and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox Inbox to expand it.
4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.
5. Select the PCR you want to review.
6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.
7. Click Services for Object to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
8. Select Attachment List. The Service: Attachment list pop-up is displayed.
9. Highlight the line item for the note, and select Display . The Display note pop-up is displayed with the note title and note information.
10. Click to close the Display note pop-up.
11. Click to close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
12. Click the back button to return to the Workflow screen.
13. With the applicable PCR still highlighted, click Execute (or double click the PCR line item).
14. Click Approve Change. Observe that you can also cancel the PCR and keep it in your files, or reject it and send it back to the Initiator.
15. Click the X in upper right to log off as the Approver. Click Yes at the Log off popup.
16. On the portal screen, click Log Off link.
17. Click Yes when prompted if you are sure. The Welcome log on screen is displayed.

Part III – Act as Funding Approver and Approve PCR

1. Log onto SAP using the **Funding Approver** user id and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox Inbox to expand it.
4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.
5. Select the PCR you want to review.
6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.
7. Click Services for Object to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
8. Select Attachment List. The Services: Attachment list pop-up is displayed.
9. Highlight the line item for the note, and select Display (or double click). The Display note pop-up is displayed with the note title and note information.
10. Click to close the Display note pop-up.
11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
12. Click the back button to return to the Workflow screen.
13. With the applicable PCR still highlighted, click Execute (or double click the PCR line item). The Employee Action Request – Funding screen is displayed.
14. Click the General tab and view for accuracy.
15. Click the Cost tab. For this exercise you will only review the data that the Funding Approver could enter on the Cost tab, but you will not actually enter data.
16. Click Update 1018 Update 1018. The Create Cost Distribution screen is displayed. The Create Cost Distribution screen is where the Funding Approver would enter data in the applicable columns to change the funding source or split funding, etc.
17. Press Enter. The Budget Distribution pop-up is displayed. This screen allows the Funding Approver to enter the amount budgeted for the position and the reason why the funding was changed.
18. Click the down arrow in the Action/Reason Code field and view the options for funding changes.
19. Click x to close the list of reasons.
20. Click to close the Budget Distribution pop-up.
21. Click the green check to close the Budget Distribution pop-up. Click Yes if you receive a warning message that indicates you have not entered data. The Cost tab is displayed.

22. Click the back button to return to the Business Workplace
23. The Decision Step in Workflow is displayed. The Funding Approver must send the PCR to the next level of approval if there is one, or approve it so that it returns to the Initiator for completion of the Action.
24. Observe that the Funding Approver can approve, cancel and keep the PCR in his or her files, or reject it and send it back to the Initiator. Click Approve Change.
25. To move from the Approver role do one of the following :
    - Minimize the Approver logon and keep on your desk top
    - Log off: Click the X in upper right, click Yes at the popup. Click the Log Off link on the portal screen, and Yes when asked if you are sure

Part IV – Process Approved PCR from Initiator's Inbox

1. Log onto SAP using the **Initiator** user id and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox Inbox to expand it.
4. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
5. Select the PCR you want to process.
6. Click Execute (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).
7. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen, you must enter the complete social security number (on WF, you only entered the last 4). For training, use any set of numbers of your choosing. **Caution! Be sure the last 4 are the same as the ones you entered on WF.** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted.
DOB	11/15/1980
Gender	Use a gender that matches the name you chose.

8. Click Enter and Execute . The Personnel Actions screen is displayed with an assigned personnel number.

9. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date
Action Type	Select New Hire

10. Click Enter .
11. Click Execute .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

12. Complete the following fields:

Infotype/Field	Value
Create Actions (0000)	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
EE Group/ Subgroup	Observe the field defaulted from WF If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Enter and Save. A warning message displays indicating that the employee and position have different groups/subgroups. Enter to bypass the warning.
Create Personal Data (0002)	
Title	Select from drop down list
Marital status	Single
Gender	A gender that matches the name you chose

Infotype/Field	Value
Dependents	Leave blank (this field is not used during the Action) Enter and Save **NOTE:** The nationality field may be on the screen in the training database, but will not part of the screen in your work environment.
Create Organizational Assignment (0001)	Enter and Save
Delimit vacancy	Yes
Create Date Specifications	Review for accuracy Enter and Save
Create Addresses (0006)	
Permanent address	78 Elm St, Raleigh, NC 27604 Wake County
Telephone	919-244-8754 Enter and Save
Tax screens (0207, 0208, 0209)	These all default from the previous information you entered. Review for accuracy, Enter and Save.
Create Withholding Info W4/W5 US	**NOTE:** The initial set-up is done by HR. Changes can be made by the employee via ESS. If updated after the first day of the month, the changes take effect the following pay period. If the employee is exempt from taxes, you will select the exempt option and choose “reportable” from the list. If the employee wants an additional amount withheld, enter the dollar amount in the “add. Withholding” field.
Federal Filing Status	Single (01)
Allowances	1 Enter and Save

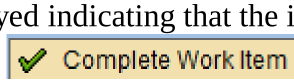
Infotype/Field	Value
Create Withholding Info W4/W5 US – State Filing Status	See the note above on Federal W4 regarding the other fields on the infotype. Single (01)
State Allowances	1 Enter and Save
Create Addresses (0006)	
Emergency	Pat King, 65 Dakota Dr, Raleigh NC 27604; telephone: 919-818-4545 Enter and Save
Mailing address/phone	123 Oak St, Raleigh NC 27604 Enter and Save
Create Monitoring of Tasks (0019)	You are using the Monitoring of Tasks infotype to remind you of a task that you need to follow up on concerning the employee (like a tickler file).
Task type	For this exercise, use End of Probation. In your work environment, you would make the selection based upon the task for which you want to be reminded.
Date of task	Enter 9 months from date of hire. In your work environment, you would enter a date applicable to your Agency process. Press Enter.
Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. Enter and Save

Create I-9 Status (0094)	
Residence status	Click the drop-down and select Citizen. Be aware that if an employee is not a citizen, you would make a different choice in the drop down, and a second infotype (0048 Residence Status) would appear. See the Student Guide for details concerning how to process infotype 0048. **NOTE**: The BEACON SAP entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system, the official system of record for non-citizen employees.
Id type	Click the drop-down and select U. S. Passport **NOTE**: There are other options in the *Employment verification section* like birth certificate, social security number, etc.
Issuing Authority	New Orleans
Id #	874032
Dates	Issues 10/1/2002, expires 10/1/2010. Enter and Save
Create Communication (0105)	919-259-4574. This infotype is for the entry of the employee's office telephone. Enter and Save You may receive a warning that the id number is already in use. Enter to bypass the warning.
Create Planned Working Time (0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area. For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Enter and Save

Create Basic Pay (0008)	Reason: **New Hire** **NOTE:** Observe that the salary defaulted from WF. Observe also that the value is **USD** which has automatically populated. If the employee was assigned to a DOT position, BEACON SAP would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees. Enter and Save
Possible subsequent activities	• Click the green check to get to the enrollment screen • Double click the "automatic offer" option in order for TSERS to display • Click the Enroll button. • Click Enroll again • Click Continue • Click the back button (top of screen) • Click the red X to return to the data entry screen
Create Bank Details	The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. You must obtain high level approval before you can change the field from "direct deposit" to "check".
Bank routing	011100106 (Wachovia)
Bank account number	5487542
Bank Control key	01 (01 is checking; 02 is savings) Enter and Save
Create Additional Personal Data (0077)	
Ethnic Origin	Use your own
Military status	Reserve
Veteran status	Non-veteran

Disability status	None/prefer not to report Click Enter and Save.
Subtypes for "Quota Corrections" pop up	Scroll and choose Military Leave (Training)
Create Quota Corrections (2013)	Quota number: 80 hours Click the drop-down box in the Transfer field and select the **Only transfer quota correction immediately** option. Enter and Save.
Subtype for Infotype "Education"	Select 06 for Bachelor (BAC) Degree Click the green check.
Create Education (0022)	
Start and to	9/01/1998 - 5/30/2002
College attended	NC State. Be sure you are consistent in the way you enter the college name. For example, you would not enter NC State on one employee and enter North Carolina State on another employee. Consistency assists when you are running reports.
Verified	Use the drop down menu and select the option that indicates that verification is pending. Enter and Save
Monitoring of Tasks (0019)	This time, the Monitoring of Tasks (0019) gives you an opportunity to follow up on the verification of the education. Monitoring of Tasks displays on your manager's self service. To view a list of your tasks, you must run the *Date Monitoring Report* (transaction S_PHO_48000450).
Task type	For this exercise, select 60 days. In your work environment, you would make the selection based upon the task for which you want to be reminded.
Date of task	Enter 60 days from today. In your work environment, you would enter a date applicable to your Agency process. Press Enter.

Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. If education is verified prior to the reminder date, the task is not automatically deleted; it will still appear on the report and on MSS. You can delimit the infotype on the day you verify the education which will keep it from appearing on the report. Enter and Save
Subtypes for infotype Certification and Licensing	Click X to remove pop-up window. This infotype is used when the position requires a specific certificate or license.
Create Objects on loan (0040)	State ID #45. **NOTE:** On the initial hire, you are to only enter one item on loan. If the employee receives more than one item--like in this case key # B05 and key #A12-- you will use PA30 to add the additional items). You will add the additional items in a subsequent lesson and exercise. Enter and Save

13. Click the back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action.
14. The pop-up is displayed indicating that the item must be explicitly completed. Click Complete Work Item 

. **NOTE:** It is critical that you complete this last step. Also be aware that if you cancelled the PCR without finishing the Action (which put the PCR back into your Inbox), when you click the Complete Work Item button, you will receive another screen where you have to indicate again that you have finished the Personnel Action.

Questions

Answer the following questions.

Question 1

What transactions must always be done prior to initiating a New Hire Workflow?

A.

Question 2

What system did SAP communicate with in order to receive the Personnel No.?

A.

Question 3

Which transaction code and infotype must you use to document any additional State-owned property the employee is issued?

A.

This exercise is complete.

Exercise 3.2: New Hire

Scenario

Cultural Resources has hired a temporary employee who will begin working today in a Technology Support Specialist position. The hourly rate is $17.30. The employee is married. The employee will be issued a laptop (serial # 4788).

There are three parts to this Exercise, however, you will only perform Parts I and III:

I Initiate Workflow (WF)
II Approve PCR as an Agency Approver and Funding Approver
III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Log onto SAP using the **Initiator** user id and password.
2. Assume you have already run the Cross Verification Report and did not find the employee in the system; assume you also used PPOSE and verified that the position is vacant.
3. On the Easy Access screen, type **ZPAA076** in the Command field.
4. Click . The Employee Action Request screen is displayed.
5. Enter the following data:

Field	Value
Last 4 digits SSN	Use any 4 digits of your choosing (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted). **Important! Write down the numbers you used because you will need them again:** ______________________________
Employee Name	Any of your choosing – **Be sure you write down the name you use because you will need this person in subsequent exercises**. ______________________________
Effective on	Today's date

Field	Value
Action Type	New Hire
Reason	New Hire

6. Click Enter .
7. Click Create . The second screen of the Employee Action Request screen is displayed.
8. Enter the following data:

Field	Value
EE Position	Use the Technology Support Specialist position number in the Data Set that was assigned to your student number. Press Enter. Observe that the Employee Group and Employee Subgroup fields are now populated.
EE Group	Use the drop down to indicate that employee is **Supplemental Staff**.
EE Subgroup	Use the drop down to indicate that the employee is **full time**, **temporary** and **subject** to overtime.
Hourly Rate	$17.30

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions: Work Against and Last Date Worked.

9. Click Enter .
10. Click Save . The Information pop-up displays with the assigned PCR number.
11. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
12. Click the green check to close the pop-up.
13. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click it to the right or left of the icon.
14. Select Create > Create Note.
15. Enter a note title.
16. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.

17. Click the green check to close notes. If applicable, close the notes icon menu.
18. Click Initiate WF. The Information pop-up displays indicating that the PCR has been submitted.
19. Click the green check to close the Information pop-up. You are returned to the Employee Action Request (first screen).
20. Click the X in upper right to log off as the Initiator. Click Yes at the Log Off popup.
21. On the portal screen, click Log Off link.
22. Click Yes when prompted if you are sure. The Welcome log on screen is displayed.

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

1. As the **Initiator** click the SAP Business Workplace button from the Easy Access screen.
2. Click the node beside Inbox Inbox to expand it.
3. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.
5. Click Execute (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).
6. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen, you must enter the complete social security number (on WF, you only entered the last 4). For training, use any set of numbers of your choosing. **Caution! Be sure the last 4 are the same as the ones you entered on WF.** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted.

Field	Value
DOB	9/21/1960
Gender	Use a gender that matches the name you chose.

7. Click Enter and Execute . The Personnel Actions screen displays with the Personnel number assigned.
8. On the Personnel Actions screen enter:

Infotype/Field	Value
From	Today's date
Action	Select New Hire

9. Click Enter .
10. Click Execute .

NOTE: By design, the direction to Enter and Save each infotype is deliberately missing in this exercise. You should be aware that you always Enter and Save every infotype that you enter data on, as well as those that are pre-populated.

11. Complete the following fields:

Field	Value
Create Actions (0000)	
Reason	Observe this defaulted from WF
Reference Per. No	Leave blank
Position	Observe this defaulted from WF
EE Group/ Subgroup	Observe the field defaulted from WF. If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Press Enter to bypass the message that the employee and position are different.
Create Personal Data (0002)	
Title	Select from drop-down list
Marital status	Married
Gender	A gender that matches the name you chose

Field	Value
Dependents	Leave Blank. Even though the employee has a dependent child, that information is **not** entered at the time of the New Hire Action. The information is entered by Benefits.
Create Organizational Assignment (0001)	
Delimit vacancy	Yes
Create Date Specifications	
Create Addresses (0006)	
Permanent address	545 Pine St, Cary, NC 27511
Telephone	919-877-5464
Tax screens (0207, 0208, 0209)	These all default from the previous information you entered. Review for accuracy.
Create Withholding Info W4/W5 US-Federal Filing Status	Married
Allowances	2
Create Withholding Info W4/W5 US – State Filing Status	Married
State Allowances	2
Create Addresses (0006)	
Emergency Contact	Sue Hahn, 23 Black St, Cary, NC 27511; telephone: 919-457-9696
Mailing address/phone	Same as permanent so skip this infotype (this is one of the times it is appropriate to use Next Record instead of Save). If the mailing address is the same as the permanent address, it is not necessary to enter it here. However, if a report is run on mailing addresses only, the employee will not display on the report.
Monitoring of Tasks (0019)	Monitoring of Tasks displays on your manager's self service. You can run a report to see your Monitoring of Tasks.
Task type	For this exercise, use End of Probation. In your work environment, you would make the selection based upon the task for which you want to be reminded.
Date of task	Enter 9 months from today. In your work environment, you would enter a date applicable to your Agency process.
Reminder date	This field has been designed to automatically populate when you press enter. You can change the date if a different date better

Field	Value
	meets your needs.
Create I-9 Status (0094)	For this exercise, use Citizen and birth certificate. The Issuing Authority is State of Virginia. Hint: You can find birth certificate in the Employment verification section of the infotype. If more than one type of document is required, the additional document is entered using PA30, infotype 0094. Be aware that if an employee is not a citizen, you would make a different choice in the drop down, and a second infotype (0048 Residence Status) would appear. See the Student Guide for details on how to complete 0048. You would also have to enter the non-citizen data in Windstar.
Create Communication (0105)	919-754-6112 Bypass the warning message if applicable.
Create Planned Working Time (0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area. For this exercise, accept the default. Observe when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field.
Create Basic Pay (0008)	Reason: **New Hire** For hourly employees, you must enter the hourly amount in the **amount** field, <u>not</u> in the annual salary field. Press Enter and the system automatically populates the annual salary rate.
Possible subsequent activities	• Click the green check to get to the enrollment screen • Double click the "automatic offer" option in order for TSERS to display • Click the Enroll button • Click Enroll again • Click Continue • Click the back button (top of screen) • Click the red X to return to the data entry screen

Field	Value
Create Bank Details (0009)	The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing.
Bank routing	021302622 (Bank of America)
Bank account number	745214784
Bank Control key	02 (01 is checking; 02 is savings)
Create Additional Personal Data (0077)	
Ethnic Origin	Use your own
Military status	Leave Blank
Veteran status	Non-veteran
Disability status	None/prefer not to report
Subtypes for infotype "Education"	High School Graduate (HS Grad)
Create Education (0022)	Start: 09/01/2000 to: 12/15/2004
Institute/location	Page High
Verified	02 (if your Agency requires verification of High School, then you would select 09 for pending).
Create Monitoring of Tasks (0019)	For this exercise, you do not need to enter a monitoring of tasks for education because high school does not have to be verified. However, in your work environment, you would follow your Agency's policy.
Subtypes for infotype Certification and Licensing	Skip the infotype
Create Objects on loan (0040)	Laptop #4788 (if employee receives more than one item on loan, you will use PA30 to add the additional items, which will be discussed in a subsequent lesson).

15. Click the back button when you are returned to the Personnel Actions screen (when you finish the last infotype within the Action the system automatically takes you back).

16. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item Complete Work Item. **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

What are some of the fields that are used differently when hiring an hourly employee than a salaried employee?

A.

This exercise is complete.

Exercise 3.3: Quick Entry

Scenario

Cultural Resources Battleship Division has been assigned a federal employee to work as a Maintenance Mechanic IV. The position is funded by the federal government (the employee is not a State employee, but is a federal employee being paid by the federal government). The employee will have access to the BEACON SAP system; therefore a Quick Entry Action is needed (if no access will be granted, you don’t need to use Quick Entry).

There are three parts to this Exercise; however, you are only responsible for Parts I and III unless otherwise directed by your instructor:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Make sure you are logged into SAP with the **Initiator** user id and password.
2. Assume you have already run the Cross Verification Report and did not find the employee in the system; assume you also used PPOSE and verified that the position is vacant.
3. On the Easy Access screen, type **ZPAA076** in the Command field
4. Click . The Employee Action Request screen is displayed.
5. Enter the following data:

Field	Value
Last 4 digits SSN	Use any 4 digits of your choosing (if you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted). **Important! Write down the numbers you used because you will need them again:** ________________________________

Field	Value
Employee Name	Any of your choosing – **Be sure you write down the name you use because you will need this person in subsequent exercises**. ___________________________________
Effective on	Today's date
Action Type	Quick Entry
Reason	Federal

6. Click Enter .
7. Click Create . The second screen of the Employee Action Request screen is displayed.
8. Enter the following data:

Field	Value
EE Position	Use the Maintenance Mechanic IV position number in the Data Set that was assigned to your student number. Press Enter. Observe that the Employee Group and Employee Subgroup fields are now populated.
EE Group/Subgroup	Change to the appropriate group/subgroup to indicate that the employee is a supplemental federal employee. O Supplemental Federal **NOTE:** When the Position number is entered, the Employee Subgroup defaults to FT N-FLSAOT Perm. Because this is a Quick Entry, the employee should be changed to the applicable Employee Group/Subgroup.
Annual Salary	Leave blank (do not enter zeroes) Bypass the warning to fill in the salary.

NOTE: Observe there are two fields that will not be used now, but will be used in later Actions: Work Against and Last Date Worked.

9. Click Enter .
10. Click Save . The Information pop-up displays with the assigned PCR number.
11. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
12. Click the green check to close the pop-up.
13. Click Services for Object and enter an applicable note.
14. Close notes and if applicable close the notes icon menu.
15. Click Initiate WF. The Information pop-up displays indicating that the PCR has been submitted.
16. Click the green check to close the Information pop-up. You are returned to the Employee Action Request (first screen).

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

1. Make sure you are logged onto SAP with the **Initiator** user id and password.
2. From the Easy Access screen, click the SAP Business Workplace button.
3. Click the node beside Inbox Inbox to expand it.
4. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
5. Select the PCR you want to process.
6. Click Execute (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen). **NOTE:** Observe that unlike a new hire, there is no assigned Personnel number.

7. On the Personnel Actions screen, enter the following data:

Infotype/Field	Value
Personnel number	Leave blank. Beacon SAP assigns the next sequential internal number. The Retirement System does not assign the personnel number on a Quick Entry.
From	Today's date
Action	Quick Entry

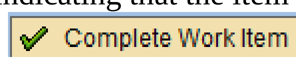
8. Click Enter .
9. Click Execute .

NOTE: By design, the direction to Enter and Save each infotype is deliberately missing in this exercise. You should be aware that you always Enter and Save every infotype that you enter data on, as well as those that are pre-populated.

10. Complete the following fields:

Field	Value
Create Actions (0000)	
Reason	Observe this defaulted from WF
Reference Per. No	Leave blank
Position	Observe this defaulted from WF
Create Personal Data (0002)	Observe that a Personnel number has now been assigned.
SSN	999-9x-xxxx (be sure to use the same last 4 digits as you used in WF). In your work environment, the data entry convention for the Social Security field for Quick Entry is 999-9x-xxxx, where x stands for the **last 5 digits** of the employee's social security number. This helps ensure that if these Quick Entry employees ever become regular State employees, they won't have an existing Social Security number in BEACON SAP.
DOB	01/28/1977
Marital status	Single
Gender	A gender that matches the name you chose
Create Organizational Assignment	
Delimit vacancy	Yes
Create Addresses (0006)	

Field	Value
Permanent address	148 Bush St, Wendell, NC 27591
Telephone	252-456-5454
Emergency Contact	Seth Harris—same as permanent address and same telephone
Mailing address/phone	None. Use the appropriate button to skip the infotype.
Create Monitoring of tasks (0019)	For this exercise, use End of Contract (which should default). Enter a date 12 months from the start date with a reminder 15 days in advance; however, be aware that in your work environment you will follow your Agency process
Create Planned Work Time (0007)	
Create Communications (0105)	919-454-2055
Objects on loan	Key # B05

17. Click the back button when you are automatically returned to the Personnel Actions screen.
18. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item 

. **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

What are the transactions you must initiate prior to processing a Quick Entry WF?

Question 2

In this instance you did not enter data on the Basic Pay (0008) infotype, nor enter tax information. Why?

A.

Question 3

List the types of employees that are hired using Quick Entry.

A.

Question 4

Under what circumstances would you not use Quick Entry for the types of employees discussed in Question 3?

A.

This exercise is complete.

Exercise 3.4: Reinstatement

Scenario

Karla Hart formerly worked with the State of North Carolina and left for the private sector. After only a few months, she decided to come back to the State. The employee is returning to Cultural Resources as an Information & Communications Spec I, which is the same position (salary and grade) that she held before she left. The salary is $30,020 annually.

While she was out, she completed the qualifications for a licensed counselor. **NOTE**: In your work environment, you only add a certification or license when it is a requirement of the position. In Karla's case, the license is not a requirement but is being presented here for you to enter in order to give you the training experience.

If a returning employee's data on an infotype has not changed, you still save the infotype in the Action.

There are three parts to this Exercise; however you are only responsible for Parts I and III unless otherwise directed by your instructor:

I Initiate Workflow (WF)
II Approve PCR
III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Assume you have already run the Cross Verification Report and verified that the employee was previously in BEACON; assume you also used PPOSE and verified that the position is vacant.
2. As the Initiator, type ZPAA076 in the Command field on the Easy Access screen.
3. Click . The Employee Action Request screen is displayed.
4. Enter the following data:

Field	Value
Personnel number	Use the Karla Hart personnel number from the Data Set that was assigned to your student number.
Effective on	Today's date
Action Type	Reinstatement
Reason	Returned within 12 months, same salary and grade

5. Click Enter .
6. Click Create . The second screen of the Employee Action Request screen is displayed. Observe that the Current column has data concerning the employee as a quick reference.
7. Enter the following data:

Field	Value
EE Position	Observe that the position field is 9s. When an employee is separated, the position field is either automatically changed to 9s by BEACON, or in the case of a Separation Pay Continuation, by the Master Data Maintainer. Use the Information & Communications Spec I position number from the Data Set that was assigned to your student number. Observe that the Employee Group and Employee Subgroup fields are now populated.
EE Group/Subgroup	Change to the appropriate subgroup to indicate that the employee is full time, subject to overtime, and is a **probationary** employee. **NOTE:** When the Position number is entered, the Employee Subgroup defaults to FT N-FLSAOT Perm and must be changed as applicable for the Action.
Annual Salary	$30,020

NOTE: By design, the step-by-step directions to complete the Action are deliberately missing in this exercise. Use the information you have learned in previous exercises to complete the application sections.

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

NOTE: In this exercise, you are entering data on an employee who already exists in the system. As a result, on each infotype you will receive a message indicating that the previous record will be delimited. Press Enter or click the Enter button to bypass the warning.

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process each infotype as applicable as outlined below
- Explicitly complete Workflow item

Field	Value
Delimit Cost Distribution (0027)	Select and delimit by using the Delimit button
Addresses (0006) Permanent	3368 Grandview Eagan NC 27609 Telephone: 919-257-4578
Federal Withholding (0210)	Single, with 1 allowance
State Withholding (0210)	Single, with 1 allowance
Addresses Emergency	Add the name Patsy Grupe. The address stayed the same.
Monitoring of Task	End of probation 9 months from today
Communication (0105)	919-707-4566

Create Basic Pay (0008)	Reason: **Reinstatement** Salary defaulted from WF
Possible subsequent activities	Enroll the employee into TSERS
Create Bank Details (0009)	
Bank routing	011001742 – Bank of America
Bank account number	2157884
Bank Control key	01 (01 is checking; 02 is savings). Observe that when the employee separated, the bank method field automatically defaulted from direct deposit. You must change the default back to direct deposit. Accept delimit message.
Subtypes for infotype "Education"	Master's degree from Wake Forest; 10/01/1988 to 12/15/2002
Create Monitoring of Tasks (0019)	Indicate that you will verify within 60 days, and that you want to be reminded 15 days prior.
Subtypes for infotypes "Certification and Licensing"	Select 0011 – Licensed counselor.
Create Certification and Licensing (0795)	The Start and To dates must be exactly the same as the Valid from and Valid To dates.
Start Date	01/15/2003
To Date	01/15/2009
Identification	The certificate # is NC0932454
Doc Status	Select Renewable
Valid from field	01/15/2003
Valid to field	01/15/2009
Copy Date Specifications (0041)	Delete the Last Day Worked information.
Create Objects on loan (0040)	Office key #987

19. Click the back button when you are automatically returned to the Personnel Actions screen.

20. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item Complete Work Item. **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

True or False. You should always save a pre-populated infotype, even if you did not make changes to it.

A.

Question 2

What was the major difference in the infotypes that were presented in the Reinstatement as opposed to a New Hire Action?

A.

Question 3

If an infotype has blank required fields for which you do not need to enter data, should you use the Next record button or the Save button?

A.

This exercise is complete.

Exercise 4.1: Salary Adjustment

Scenario

The supervisor of the first employee you hired (Exercise 3.1) has been in a serious accident and is out on leave for at least four months. Your employee, who is a Digitization Clerk, is being asked to assume some of the major responsibilities of the supervisor (Digital Project Manager) for a specific length of time. Adjust the salary of the Digitization Clerk so that the employee is receiving acting pay of $38,000. The effective date is the 1st day of next month and will end four months from that date. In your work environment, you would use PA30 to enter a reminder (Monitoring of Tasks) to remove the acting pay from the employee at the end of four months.

NOTE: In this exercise, the Approver will return the PCR to you for a correction to give you practice reading the note and resubmitting the PCR.

There are five parts to this Exercise; however, you are only responsible for Parts I, III and V:

- I Initiate Workflow (WF)
- II Approver returns PCR
- III Correct the PCR and resubmit
- IV Approve PCR
- V Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, access ZPAA076 and enter the following data:

Field	Value
Personnel number	Use the employee name you hired in Exercise 3.1
Effective on	1st day of next month
Action Type	Salary Adjustment
Reason	Acting Pay

2. Click Enter.
3. Click Create. The second screen of the Employee Action Request screen is displayed.
4. Enter the following data:

Field	Value
Annual Salary	$38,000

NOTE: To complete Part I, use the information you learned from previous exercises to:

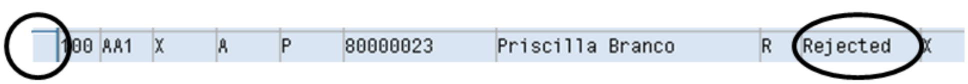
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II - Instructor or Navigator will Return the PCR

Note to instructor and navigator: As the **Agency Approver,** RETURN (Reject) the PCR. Write a note that indicates the salary should have been $28,550.

Part III – Correct the Returned PCR

1. From you Inbox, execute the Rejected PCR. The Decision Step in Workflow screen appears.
2. Click the PCR_List: Workflow Tracker link.
3. Find the line item that contains the word “rejected” beside the name of the Approver.
4. Click the square to the left of the line item to highlight and select it.



5. Click the Notes button Notes (toward the bottom of the screen) and review the correction that needs to be made.
6. Click the Back button to exit the note.
7. Click the Back button to exit the Workflow Actions screen.
8. At the Decision Step in Workflow screen, click Change and Resubmit.
9. Based on the message in the note, make the appropriate correction.
10. Click Save. A popup message indicates the PCR was saved. Observe that the Initiate Workflow button is grayed out.
11. Click the Green Check to exit the popup message.
12. Click the Back button.
13. At the *This Item Must be Explicitly Completed* popup, click Complete Work Item. The PCR is re-submitted to the first level Approver.

Part IV - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part V – Process Approved PCR

NOTE: For Part V, use the information you learned from previous exercises to process the approved PCR:

- As the Initiator, execute the approved PCR
- Enter the applicable date and select the Action on Personnel Actions screen
- Process each infotype as applicable. Don't forget to enter the Reason on IT0008.
- Explicitly complete Workflow item

Questions

Answer the following questions.

Question 1

Which infotype will you use to enter a reminder to remove the salary adjustment at the end of four months?

A.

Question 2

At the end of four months, which Action do you think you would use to remove the acting pay?

A.

This exercise is complete.

Exercise 4.2: Appointment Change

Scenario

Leona Grayson was hired in Cultural Resources as a Historic Sites Specialist I in trainee status, and has completed the training progression. You need to create an Appointment Change to change the employee's status to permanent, full time, not subject to FLSA overtime. In addition, the employee received a 5% ($1,635) increase in salary.

See the Student Guide for information about changing temporary employees to permanent employees.

There are three parts to this Exercise; however, you are only responsible for Parts I and III unless otherwise directed by your instructor:

I Initiate Workflow (WF)
II Approve PCR
III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, type **ZPAA076** in the Command field on the Easy Access screen.
2. Click . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Leona Grayson from the Data Sheet assigned to your student number
Effective on	Today's date
Action Type	Appointment Change
Reason	Trainee to Perm

4. Click Enter .
5. Click Create . The second screen of the Employee Action Request screen is displayed.
6. Enter the following data:

Field	Value
EE subgroup	A1
Annual Salary	$34,340

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you will only initiate the WF. When the PCR is approved and back in your inbox, you must contact BEST.

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you would not process the approved PCR (you would, however, initiate the PCR for approval). Contact BEST.

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Log in as the **Initiator**
- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process infotypes as applicable
- Explicitly complete Workflow item

Field	Value
Create Basic Pay (0008)	Reason: **Appointment Change** Salary defaulted from WF

Questions

Answer the following questions.

Question 1

What field in Workflow did you have to revise to ensure that the employee's status was full-time, not subject to FLSA overtime?

A.

Question 2

Did the Workflow Employee Group change?

A.

This exercise is complete.

Exercise 4.3: Range Revision

Scenario

OSP has notified you that a range revision for the Historic Interpreter job class has been approved which affected all Docent Coordinator positions. Additionally, you have been notified that the job class and the positions have been changed by Shared Services Organizational Management (SSOM) to reflect the revision from Grade 62 to 68. The new range has increased the employee's salary to $44,500.

You have identified that Rose Brown in your Agency was affected by the revision. Funds are available for the employee to receive the full amount. The effective date is today. Observe that the employee’s grade has already been changed based on the changes SSOM made to the job class.

There are three parts to this Exercise; however, you are only responsible for Parts I and III unless otherwise directed by the instructor:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, type **ZPAA076** in the Command field on the Easy Access screen.
2. Click . The Employee Action Request screen displays.
3. Enter the following data:

Field	Value
Personnel number	Use the Rose Brown from the Data Sheet assigned to your student number
Effective on	Today’s date
Action Type	Range Revision
Reason	Range Revision (full)
Annual Salary	$44,500.

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process the infotypes as applicable
- Explicitly complete Workflow item

Field	Value
Create Basic Pay (0008)	Reason: **Range Revision**

Questions

Answer the following question.

Question 1

What must take place prior to initiating ZPAA076-Workflow approval process?

A.

This exercise is complete.

Exercise 5.1: Promotion

Scenario

The supervisor for Karla Hart is promoting her from an Informational I Communications Spec I position to an Informational & Communications Spec II position. The promotion will be effective as of the 15th of the next month. The accompanying pay increase is in accordance with State policy. The new salary is $36,000. Process the promotion in SAP.

Don't forget! You must have reinstated the Karla Hart assigned to you in a previous exercise before you can promote her. Before you begin, use PA20 to view the Actions infotype to make sure that the Karla Hart assigned to you indicates "Reinstated" as her last action.

There are three parts to this Exercise; however, you are only responsible for Parts I and Parts III unless otherwise directed by the instructor:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, type **ZPAA076** in the Command field on the Easy Access screen.
2. Click . The Employee Action Request screen displays.
3. Enter the following data:

Field	Value
Personnel number	Use the Karla Hart from the Data Sheet assigned to your student number
Effective on	15th of next month
Action Type	Promotion
Reason	Promotion
Annual Salary	$36,000

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you would not process the PCR. Contact BEST.

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process infotypes as applicable
- Explicitly complete Workflow item

Field	Value
Create Basic Pay (0008)	Reason: **Promotion**

Exercise 6.1: Separation

Overview

Cost Distribution: The Cost Distribution infotype displays in both types of Separation Action. In each case, you save the infotype to create the existing record. This record is needed in order to process any subsequent payouts to a separated employee who is in withdrawn status.

Caution! You should always ensure that time evaluation has been run for the employee and that the time balances to be paid out are accurate. Check to see that the last timesheet has been entered and approved.

Separation Date: The State of North Carolina defines your effective separation date as the last day you are still an employee. BEACON SAP defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). BEACON SAP automatically adds one day to the last day worked within the action. However, you must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Scenario

Nicole Ahrens has informed you that the 15th of next month is the last day she will work. She is resigning effective that day for personal reasons and has leave that needs to be paid out. As you enter the Separation Action, you should remember to delimit any items on loan that the employee returned. If the employee has not returned the items on loan, but you need to process the Action in order to get him or her off payroll, you can go ahead and complete the Separation Action, but in that case, do not delimit the items on loan. You should then complete a PA30 on Monitoring of Tasks (0019) to create a reminder to retrieve the items.

There are four parts to this Exercise; however, you are only responsible for Parts I and III unless otherwise directed by your instructor:

I Initiate Workflow (WF).
II Approve PCR
III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, type **ZPAA076** in the Command field Log the Easy Access screen.
2. Click . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Nicole Ahrens from the Data Sheet assigned to your student number
Effective on	15^{th} of next month
Action Type	Separation
Reason	Personal

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR from Initiator's Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process the infotypes as applicable
    - Subtypes for infotype Time Quota compensation popup: select vacation payout
    - Infotype 0416: Change the Date!
    - Enter hours equal to those in the Rem. Column.
- Explicitly complete Workflow item

Questions

Answer the following questions.

Question 1

What is the main difference between a Separation Action and a Separation Pay Continuation Action?

A

Question 2

Which infotype must be delimited when a Separation occurs?

A.

This exercise is complete.

Exercise 7.1: PA30 – Maintain Master Data – Verify Education

Scenario

Assume it is the first day of the next month. You have received verification of the education information for the first employee that you hired (Exercise 3.1). Enter the verification on the employee's record using the Education infotype.

In addition, you realize that you forgot to enter the two keys (#B05 and #A12) that the employee received when first hired. Enter those items now.

Caution! You will be working with two effective dates.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code PA30 in the Command field and click .
2. Enter the Personnel number of the employee you hired in Exercise 3.1.
3. In the Infotype field (the white space at the bottom of the screen), enter 0022 (Education).
4. Enter the subtype 06 (Bac Deg) in the Sty field, or use the matchcode to select the appropriate verified education from the drop down menu.
5. Press Enter. The numerical codes are changed to the appropriate wording for the selections you have entered.
6. Select (Copy). The Copy Education screen displays.
7. Observe that the screen shows the data that was entered when the employee was hired.
8. In the Start date field, change the date to reflect the date you received the verification (first day of next month).
9. In the to date field change the date to 12/31/9999.
10. Change the Verified field (in training the field may be entitled Certificate) to the appropriate education. You can enter the code in the Verified field or use the matchcode to select from the drop down menu.
11. Press Enter to validate the information.
12. Click Save.
13. In the Infotype field, type **Objects on Loan**.
14. Press Enter.
15. In the subtype field, use the matchcode to select office keys (double click or use the green check).
16. Press Enter. The infotype name (Objects on Loan) and subtype name (keys) should display on the screen.

17. Select (New).
18. Change the date as appropriate (hint: what date was the employee hired?)
19. In the Number field, enter **1**.
20. In the unit field, use the matchcode and select **pieces**.
21. Enter the key number in the Loan Object No. field.
22. Use the Copy function to add the remaining key.

Questions

Answer the following questions.

Question 1

Which infotype did you use to enter the verification?

A.

Question 2

What code did you enter to indicate that you had verified the education?

A.

Question 3

Describe what steps to take when an employee is issued more than one item on loan at the time he or she is hired.

A.

This exercise is complete.

Exercise 7.2: Maintain Master Data – Objects on Loan

Scenario

Rose Brown has been assigned a cell phone. The telephone number is 919.555.1314. The serial number is 4N888. The telephone was issued to her today.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PA30** in the command field and click .
2. Select the same Rose Brown employee number that you used in a previous exercise.
3. Select the applicable infotype.
4. Complete the following fields:

Field	Value
Objects on Loan	Cell phone

Questions

Answer the following questions.

Question 1

Which infotype did you use to enter the new cell phone?

A.

Question 2

What is the ending date and how was it entered?

A.

This exercise is complete.

Exercise 7.3: Maintain Master Data – Bank Information

Scenario

Karla Hart has informed you that, in addition to her current bank, she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

Update the employee's BEACON SAP record to reflect the change to the banking information. Karla's new bank is Capital. The bank key is 053112123. Her checking account number is 84568; savings is 684511.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PA30** in the command field and click .
2. Select the employee assigned to your student/computer number.
3. Select the applicable infotype (in this case Bank Details and Other as the subtype) and complete the appropriate fields using the Create feature. Save your entry.
4. Select the same infotype and subtype, but choose the Copy feature to complete the exercise.

Questions

Answer the following questions.

Question 1

True or False: You have to enter data on 0008 Basic Pay infotype to enter the new banking information?

A

Question 2

What adjustment did you have to make to indicate that the money should go into the savings account and not the checking account?

A

Question 3

What advice would you give an employee who is making a bank change request?

A

This exercise is complete.

Exercise 7.4: Separation Pay Continuation

Overview

When you initiate a Separation Pay Continuation, there are at least 3 aspects of the process (1) Separation Pay Continuation Action (2) PA30 Monitoring of Tasks (3) Separation Action

The State of North Carolina defines your effective separation date as the last day you are still an employee. BEACON SAP defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). BEACON SAP automatically adds one day to the last day worked within the action. However, you must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

In the Separation Pay Continuation, BEACON SAP does not default the position to 99999999. You must manually change the position to the default value in order for the position to show as vacant. **Do not change** the position number to 9s **in Workflow**. You **change** the position number to 9s **on the Actions infotype** when you process the approved PCR (Personnel Actions).

Create a PA30 Monitoring of Tasks to remind you at the end of the pay continuation to go in and initiate a regular Separation. For the following exercise (Inez Hayes), you would enter a due date that is 4 months from the Separation Pay Continuation Action to remind you to execute a regular Separation on that date. If the Separation Pay Continuation is for a law enforcement office, enter the date of the task **as the last date of the month** in which the employee turns 62, with a reminder 2-3 weeks prior that you must complete a regular Separation. If the law enforcement employee is on Separation Pay Continuation and dies prior to his or her 62nd birthday, a Separation would need to be created.

Caution! You should always ensure that time evaluation has been run and that the time balances to be paid out are accurate.

Scenario

The department for which your employee (Inez Hayes) works is being downsized. As a result, Inez will be given severance for 4 months. Inez has applicable leave that she wants to be paid out also.

There are three parts to this Exercise; however, you are only responsible for Parts I and III unless otherwise directed by your instructor:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, **ZPAA076** in the Command field on the Easy Access screen.
2. Click . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Inez Hayes from the Data Sheet assigned to your student number
Effective on	15th of next month
Action Type	Separation Pay Continuation
Reason	Reduction – In- Force Severance

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow
- Log out

Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Part III – Process Approved PCR

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process the infotypes as applicable
    - Actions : change the position number to 9s
    - Subtypes for infotype Time Quota popup: Select Vacation Payout
    - Create Time Compensation:
        - Change the date!
        - Enter the number of hours that are reflected in the Rem. column
- Explicitly complete Workflow item

PA30

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PA30** in the command field and click .
2. Select the employee.
3. Select the applicable infotype for Monitoring of Task and complete the appropriate fields. You want this infotype as a reminder to follow up and perform the regular Separation when the severance ends in four months.

Questions

Answer the following questions.

Question 1

After you enter the Separation Pay Continuation, what is the next step you should take?

A.

This exercise is complete.

Exercise 7.5: Range Revision

Overview

When a Range Revision is processed and no funds are available, there are additional steps that must be implemented. First, you must make an entry on the employee's record that a Range Revision was authorized, but that no funds are available. Then you must put the balance of the funds in reserve. This step is necessary in case the funds are eventually released, and the employee is entitled to some or all of the reserve funds. Later, if some or all of the funds are released, another Range Revision Action with an applicable reason will need to be processed. In addition, the applicable adjustment will need to be made to the PA30 Wage Maintenance infotype.

For this exercise, the funds of $1,500 will be released in two increments ($500 and then $1,000).

This exercise contains three scenarios. Each scenario has four parts. You are responsible for Parts I, III, and IV:

I	Initiate Workflow (WF)
II	Approve PCR
III	Process Approved PCR
IV	Process PA30 to reserve the balance

Scenario A: Part I – Initiate Workflow

OSP has notified you that a range revision for the Accounting Clerk job class and position has been approved. Additionally, you have been notified that both the job class and the position have been changed by Shared Services Organizational Management to reflect the revision from Grade 59 to 61. The employee's current salary of $36,500 will be increased by $1,500. You have identified that one employee (Emily Stafford) in your Agency was affected by the revision. However, there are no funds for an increase to the employee. The effective date is today. Observe that the employee's grade has already been changed based on the change that SSOM made to the job class. You need to enter the Range Revision and then reserve the balance for the employee.

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. As the Initiator, type **ZPAA076** in the Command field on the Easy Access screen.
2. Click . The Employee Action Request screen is displayed.

3. Enter the following data:

Field	Value
Personnel number	Use the Emily Stafford from the Data Sheet assigned to your student number.
Effective on	Today's date
Action Type	Range Revision
Reason	RR No Salary adjustment

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Scenario A: Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Scenario A: Part III – Process Approved PCR from Initiator's Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process infotypes as applicable
- Explicitly complete Workflow

Field	Value
Basic Pay	Reason: Range Revision

Scenario A: Instructions Part IV – Reserve the balance in PA30

Reserve the balance in the employee's wage maintenance infotype

You must now put the money on reserve by modifying the employee's Wage Maintenance (0052) infotype. Use the **Create** function to enter the data. The effective date is the same as the Range Revision. Observe when you access the Wage Maintenance infotype, there are several blank fields. Those do not require data entry, and they are not supposed to default from any previous entry.

1. From the Easy Access screen, enter **PA30** in the Command field
2. Enter the employee's personnel number (be sure you use the same one you used in the first part of the exercise).
3. Enter **Infotype 0052** (Wage Maintenance) and **subtype 0100** (Future Adjustment Range Revision).
4. Click **Enter** to validate.
5. Click the **Create** icon.
6. Type **today's** date in the **Start Date** field.
7. Type the **amount being reserved** in the **Amount** field (for this example, enter $1,500.00).
8. **Enter** and **Save**.

Scenario B: Part I – Initiate Workflow

Assume that it is 15 days from the current date. You have received word that $500 of the money has been released. You will go back to Workflow and submit another PCR for a Range Revision with the new date, reason and salary amount.

1. As the Initiator, create a new WF.
2. Be sure to **use 15 days from today** as the effective date.
3. Reason for this new Action is: **Range Revision Partial**.
4. The new salary is: **$37k** (this represents the original salary of $36,500 plus the $500 range revision funds just released).

Scenario B: Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Scenario B: Part III - Process the Approved PCR as the Initiator

1. Access the Inbox and process the PCR

Scenario B: Part IV - Reduce the Wage Maintenance Balance

You must now decrease the amount on the employee's Wage Maintenance infotype by $500.

1. Enter **PA30** in the Command field.
2. Enter employee personnel number (verify you have selected the correct one).
3. Enter **0052** in the Infotype field and **0100** in the Subtype field.
4. Click the **Copy** button.
5. Change the date to **15 days from today's date** (it is always the same date that you entered the Range Revision to give the released funds to the employee).
6. In the **Amount** field, highlight the $1,500 to delete it and enter $1,000 in the amount field (the sum when you subtract $500 from $1500).
7. **Enter** and **Save.** Select the Overview option on the infotype. You should have two line items: one for the original $1,500 and one for $1,000.

Scenario C: Part I - New Range Revision – More Funds Have Been Released

Assume that it is 30 days from the current date. You have received word that the rest of the reserve money ($1,000) has been released. You will go back to Workflow and submit another PCR for a Range Revision with the new date, reason and salary amount.

1. As the Initiator, create a new WF.
2. Be sure to **use 30 days from today** as the effective date.
3. Reason for this new Action is: **After effective date complete**
4. The new salary is: **$38k** (this represents the previous salary of $37,000 plus the $1000 range revision funds just released).

Scenario C: Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There are two approval levels:

- Agency
- Funding

Scenario C: Part III - Process the Approved PCR

1. Access the Initiator Inbox and process the PCR

After the Range Revision is complete, you must then access PA30. This time, you will **delimit** the balance on the Wage Maintenance infotype.

Scenario C: Part IV - Delimit the Reserve on Wage Maintenance

Because all of the reserved funds have been given to the employee, the reserve must be delimited.

1. Enter **PA30** in the Easy Access Command field (only in training).
2. Enter employee personnel number and verify.
3. Enter **Infotype 52** and **subtype 0100**.
4. Click the **Delimit** button.
5. On the **Delimit** pop-up window, enter the **date** (1 day past when you gave the remainder of the money). You enter 1 day past because SAP will use the day prior to delimit the infotype. So if you want the infotype to show an end date the same as when you gave the remainder of the money, you have to enter the delimit date as one day past).
6. Click **Continue** button.
7. Select line item (there should only be one line that is displayed for $1,000) and click the **Delimit** button again.
8. To verify both line items are delimited Click the **Overview** button. The List Wage Maintenance screen appears.
9. Result: you will see both line items delimited (one for $1,000 and one for $1,500).
10. While you are on the List Wage Maintenance screen, select the line item with the $1,000 delimited amount.
11. Click the Copy button.
12. Click Edit > Maintain Text and write a note that indicates all funds have been distributed.
13. Click Save to save the note.
14. Click Save at the Copy Wage Maintenance screen.
15. Enter to bypass the warning that a record will be deleted.
16. Click the Back button to return to the Maintain HR Data screen.
17. Select the All time period.
18. Use the Display function to view both infotypes and read the accompanying note.

Questions

Answer the following questions.

Question 1

When funds are available, which Action would you use to increase the salary?

A

Question 2

What must take place prior to initiating ZPAA076-Workflow approval?

A.

Question 3

If you were not sure whether use to the reason "Range Revision Full" or "Range Revision After Effective Date Complete", how you make the determination?

A

This exercise is complete.

Exercise 7.6: Maintain Master Data

Scenario

You realize a couple of infotypes need to be modified on the employee you hired in Exercise 3.2:

- You forgot to include a note on the Actions infotype when you processed the new hire Action.

- You entered the wrong street number on IT0006, permanent address. The street number should be 18 (the street name is correct).

NOTE: When you use the Copy function and use the same effective date as the original entry, on many infotypes you are over-writing the original information with the new information. That is why it is **critical when you use the Copy function to make sure you always change the date accordingly depending upon whether or not you want to maintain history or overwrite it.**

For the State of North Carolina, a decision was made that instead of using the Pencil to make corrections, you will always use the Copy function instead.

Below is additional information on how to make corrections to specific errors. You will not perform these corrections in class.

Correct an Employee Group/Subgroup

Caution! Only use these steps if the wrong EEGroup or Subgroup was entered and needs to be corrected.

1. Access employee via PA30.
2. Select the Actions infotype.
3. Click the Overview button.
4. Select the line item for the Action that contains the wrong employee group/subgroup.
5. Click Copy.
6. Change the field(s) as applicable to correct.
7. Save. A message displays that your entry will delete a record. Click the green check.
8. Page forward (past Personal Data) until you reach the Organizational Assignment infotype.
9. Click Save.
10. Exit.

Correct Hire Date or Separation Date—use PA41

Caution! Only the HR Master Data Approver can make the correction and can only do so if the Action has been completed, and prior to the payroll cutoff date. Having to use this transaction code should be an infrequent occurrence, not a regular one.

Exercise 8.1: Maintain Master Data – Adjustment Reasons

Scenario

Emily Stafford has provided documentation that she just had a daughter who needs to be added to her benefit plan. The baby was born the first day of the current month

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PA30** in the command field and click .
2. Enter infotype **0378**.
3. Select the Emily Stafford you used in previous exercises.

Questions

Answer the following questions.

Question 1

What infotype did you have to create first before the new dependent could be added?

A

Question 2

What advice would you give employees about how to get the life event processed on their family member/dependent record?

A.

Question 3

Who verifies the documentation, and where does the documentation reside?

A.

This exercise is complete.

Exercise 9.1: Maintain Employee Data – Planned Working Time

Scenario

The first day of this month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week **nights**, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Access the applicable infotype and update Jimmy's files.

This exercise is complete.

Exercise 9.2: Maintain Master Data – Substitutions

Scenario

Be sure the read the information in the Student Guide concerning the Substitutions infotype.

Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule indicates that he gets night shift premium. For these two days, night shift premium should not be paid.

Create a Substitution for him for those two days and select the appropriate Work Schedule Rule (WSR).

Instructions

1. From the Easy Access screen, enter transaction code **PA30** in the Command field and click .
2. Select the same Jimmy Chonez that you used in previous exercises.
3. Enter **Substitutions infotype** (2003).
4. Click **Create**. The subtype field should have defaulted to *shift substitution*. If necessary, enter the subtype code.
5. Enter the **From date** to reflect next Sunday's date and enter the same date for the **to** date.
6. Enter **1D10** in the Daily work schedule field (use the matchcode to see all of the available options).
7. Enter and **Save**.

This exercise is complete.

Exercise 9.3: Revise Position Settings

Scenario

You have received verification that the position settings were incorrect on the Information & Communication Specialist II position (used to promote Karla Hart in Exercise 5.1). Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout; both with a 60 day payout.

Caution! Be sure to use the position you promoted Karla to (not the position you reinstated her to).

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PO13** in the command field and click .
2. Enter the Information & Communication Specialist II position number from the Data Set that was assigned to you.
3. Press Enter.
4. Use the scroll bar to locate and select the Overtime Compensation infotype.
5. Click the "Activate infotype" (matchstick) button and verify that the message on the task bar indicates you have selected infotype 9005.
6. Click the Create function.
7. Enter the correct date in the first date field. The end date should be 12/31/9999.
8. Enter 60 in the Comp Aging Limit field.
9. Enter and Save.
10. Use the same process to make the appropriate revision to the Holiday Payout infotype.
11. Use the Display button to review the infotypes.
12. You just discovered that the payout for the Overtime Compensation should have been immediate, not 60 days. Use the Copy function to make the appropriate correction to the infotype. **NOTE:** Using the Copy function with the same effective date "erases" the old data and you are left with only the current corrected record.

Questions

Answer the following questions.

Question 1

If the position revision should be back dated to a previous payroll period, what additional step would you take?

A.

Question 2

True or False? Every employee placed on Leave of Absence must be placed on a Substitution work schedule?

A.

Question 3

Which infotype can Time Administrators use with applicable subtypes to influence time management behavior for specific employees for specific periods of time?

A.